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ScienceDirect

Procedia Computer Science 64 (2015) 324 – 333

Procedia
Computer Science

Conference on ENTERprise Information Systems / International Conference on Project
MANagement / Conference on Health and Social Care Information Systems and Technologies,
CENTERIS / ProjMAN / HCist 2015 October 7-9, 2015

Towards identifying success factors for cross-cultural project customer engagement: A literature review

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Abstract

Cross-cultural project management remains an important challenge for project managers and project management scholars. Successful projects need to effectively engage project customers and the key question becomes how to adequately engage project customers from foreign cultural backgrounds. This paper presents the preliminary results of a literature review in cross-cultural project customer integration. The guiding question for the review is: Which success factors can be identified in scientific literature for the cross-cultural integration of customers in projects. The paper introduces the topic and shortly lays out the necessary definitions before presenting the reviewed literature that is relevant to the review question. The literature is categorized and analyzed on abstract and findings level. The preliminary analysis reveals that the cross-cultural integration of project customers is not well researched and that further investigation in these areas is necessary. Future research is going to deepen the analysis of the presented studies. The aim is to lay the groundwork for further empirical research into success factors for customer integration in intercultural projects.

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Peer-review under responsibility of SciKA - Association for Promotion and Dissemination of Scientific Knowledge

Keywords: customer engagement; client involvement; international project management; cross-cultural projects; national culture.

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1. Introduction

This literature review aims at identifying scientific contributions in the area of cross-cultural customer engagement in projects. Intercultural problems can harm the customer relationship in projects, for example by allowing the customer to lose face or by misinterpreting the subliminal messages sent by either project manager or customer. The question of how to adequately and effectively engage project customers from other national cultures is important because ultimately it is the customer who accepts or rejects deliverables and defines project success. The Standish Group's Chaos Report frequently ranks customer related issues such as user involvement, clear requirements, and realistic expectations as key success factors in IT-projects (compare Chaos Reports 2010-2014). Agile project management approaches such as Scrum, Lean/Kanban, Dynamic Systems Development Framework, or Adaptive Project Framework are gaining popularity because they offer a framework for deeper customer involvement in projects.¹

At the same time the ongoing internationalization of companies and projects imposes a significant intercultural challenge to project management. Today it is not unrealistic for a project manager to work in Brussels with American, French, Nigerian and Portuguese team members at different locations, developing a product or service for customers in the UK, Finland, France and Singapore. Managing culturally diverse project teams is a complex endeavor and has been studied by a number of authors.^{2 3 4 5 6 7} Ultimately it is the customer however who has to accept the deliverables, and managing intercultural challenges with the project customer has only scarcely been addressed in international project management publications.

The following sections of this paper will present the preliminary findings on what is known in project management literature about adequately engaging or managing customers from other national cultures. The results remain preliminary because the review mainly includes articles from English-speaking peer reviewed articles in the project management field. It includes search results of relevant combinations of the terms "Intercultural" and "Project Management" and "Customer/Client Involvement" and their synonyms. An exhaustive search for transferable knowledge from areas such as Intercultural Marketing or Communication is an ongoing concern and will complement the results of the study as soon as available. The review question underlying this literature review can therefore be formulated as follows:

Q: How does the existing scientific literature help to understand success factors for the cross-cultural project customer integration?

The following sections will shortly describe the conceptual framework and define the relevant key terms before starting to present and summarize the results of the literature review in section three. The fourth section will draw conclusions and indicate areas that need further research before the last section critically assesses the results of this contribution.

2. Definitions

Project and Project Management:

In the area of project management there are a number of international institutions that define tools, processes and capabilities in order to successfully manage projects. The most important of these organizations are "Projects in Controlled Environments" (Prince 2), "International Project Management Association" (IPMA) and the "Project Management Institute" (PMI).

For the purpose of this work the PMI Standard appears to be the most relevant international standard since this paper aims at analyzing intercultural problems in projects and PMI offers the largest number of certified professionals with more than 412.000 members in 207 countries.⁸ PMI defines a project as a "...temporary endeavor undertaken to create a unique product, service, or result" and explains further that projects are non-repetitive ongoing work and therefore "...there may be uncertainties or differences in the products, services, or results that the project creates" (PMI, p. 3).⁹

Project Management is defined by PMI as "...the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements" and they continue with the PMI specific description that "[P]roject

management is accomplished through the appropriate application and integration of 47 logically grouped project management processes, ..." (PMI, p. 5).⁹

The question of what makes a project successful, or even what "successful" means, is debated and varies depending on the stakeholder's perspective and cultural background.^{10 11} According PMI project success "...should be measured in terms of completing the project within the constraints of scope, time, cost, quality, resources, and risk as approved between the project managers and senior management" (PMI, p. 35). Project performance on the other hand can be defined as the degree to which the project remains within these boundaries or baselines.⁹ Success factors are consequently those factors that contribute to the successful project completion within the project's constraints. This work aims at success factors for properly integrating project customers from other cultures.

Project Stakeholder and Customer Management:

PMI defines the term project stakeholder as follows: "An individual, group or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project." (PMI, p. 563)⁹

This is a broad definition since it includes not only those that are actively or passively involved in the project, but also those who perceive themselves affected. In practice, and also in the PMBoK Guide project stakeholders are usually subdivided into external, internal or according to their importance for project management.⁹ The focus of this paper is the analysis of a particular group of external stakeholders, namely project customers. It is therefore essential to also explain the framework of stakeholder management.

"Project Stakeholder Management includes the processes required to identify the people, groups, or organizations that could impact or be impacted by the project, to analyze stakeholder expectations and impact on the project, and to develop appropriate management strategies for effectively engaging stakeholders in general and customers in particular in project decisions and execution." (PMI, p. 391)⁹

Culture and the Management of Cultural Diversity:

Among scholars and practitioners there is no agreement on a definition of culture. For the remainder of this article culture shall be defined according to Hofstede and Trompenaars. "Culture [...] is the collective programming of the mind which distinguishes the members of one group or category of people from another. Culture is learned, not innate. It derives from one's social environment rather than one's genes." (Hofstede, p. 6)¹²

This definition of culture, given by Geerd Hofstede, summarizes the major aspects of this complex topic. It may be complemented with the following: "Our own culture is like water to a fish. It sustains us. We live and breathe through it. [...] a fish only discovers its need for water when it is no longer in it." (Trompenaars and Hampden-Turner, p. 27)¹³ Trompenaars' and Hampden-Turner's complementary definition of culture displays how the cultural predisposition of a person impacts on the overall perception of cultural differences.

This paper focuses on national culture. Organizational, professional, or ethnical cultures are important factors in project management, but are not included in this review. The terms intercultural and cross-cultural will be used synonymously in this paper.

Having clarified the definitions that will be relevant for the rest of this paper, the following chapter will summarize the findings of the literature review in the relevant fields of management research.

3. Literature Review

Fig. 1 shows how this review categorizes the reviewed literature within the field of project management and the intersections that result from this. Articles are included that cover the topics of Project Customer Management, Project Stakeholder Management and Intercultural Project Management. These categories are extracted from standard literature and complementary discussions with scholars and practitioners.

Stakeholder Management is included since it offers an established body of knowledge for identifying and managing project stakeholders in general. *Customer Management* focuses on one important project stakeholder in particular. *Intercultural Management* offers insight into concepts and models that help managers understand and manage cultural diversity. These three knowledge areas overlap with each other and with the field of project management.

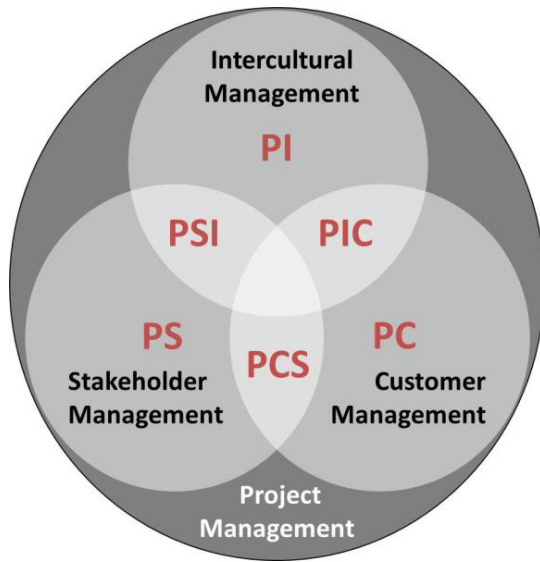


Fig. 1: Knowledge Categories for Literature Review.

Fig. 1 highlights the different overlaps in bold red letters. Thus, PI stands for articles covering intercultural project management. The intersection PS and PC contain project stakeholder and project customer management respectively.

Articles with higher relevance for understanding cross-cultural customer management in projects will come from the intersections PSI and PIC. This indicates that they are concerned with intercultural project stakeholder management, intercultural project customer management or project customer and stakeholder management. There are no articles categorized as PCS because as soon as studies involve customers they enter either the PI or the PIC category.

The results presented in this paper are based on 3 phases of a literature review including a full-text search of electronically available articles. For this the author combined relevant combinations of the knowledge areas shown in Fig. 1 and possible synonyms. The *first phase* was a search conducted in the “disco” search engine giving access to the most important scientific databases with 3.5 million books, 200 million articles, and more than 100.000 scientific journals. Table 1 gives an overview of the terms that are combined for the full text search during the first phase of the analysis.

Table 1. Key Word Combinations of Literature Search.

Customer Management	Intercultural Management	Project Management
Customer/Client Integration	Intercultural*	Project Management
Customer/Client Management	International*	Project Planning
Customer/Client Involvement	Cross-Cultural	
Customer/Client Relationship	Cross-Country	
Client-vendor Integration	Trans-national	
Client-vendor Management	Foreign cultures	
Client-vendor Involvement	Foreign countries	
Client Vendor Relationship	Culture, cultural	
	Diverse, diversity,	

The *first phase* yielded 152 articles. 16 of which are selected as relevant to the research question of this study. Based on title and abstract, articles are selected that address intercultural or international project management problems and that contribute to the project customer management areas.

In the *second phase* the search was complemented by identifying articles that are quoted in standard literature textbooks and by a further database search. This further research used the keyword “stakeholder” and synonyms in order to additionally identify relevant contributions from that knowledge area. In total the complemented search for literature identified 87 scientific articles and books.

Phase three included the deeper analysis of article abstracts and findings and resulted in the categorization of articles according to Fig. 1. Articles that lacked an international/intercultural, stakeholder/customer or project management component were excluded from further analysis. Furthermore the relevance of the articles is evaluated on a scale from 1 (not relevant) to 5 (highly relevant). Thus, it is possible to identify 66 articles with high or very high relevance with regards to the research question of this paper. Table 2 summarizes the results of the literature review and shows the number of contributions from various scientific journals to each category.

Table 2: Summary of Results by Knowledge Area.

Category	Number of studies	Journals & References (number of articles)
PI	30	International Journal of Project Management (13; ^{2 14 15 16 17 18 19 20 21 22 23 24 25}); Project Management Journal (2; ^{26 27}); Academy of Management Journal (1; ²⁸); Benchmarking: an international journal (1; ²⁹); Computational and Mathematical Organization Theory (1; ³⁰); Global Journal of Flexible Systems Management (1; ³¹); Intercultural Pragmatics (1; ³²); International Journal of Cross Cultural Management (1; ³³); Organizational Dynamics (1; ⁵); Books (4; ^{7 6 34 35}); Other (4; ^{36 37 38 39})
PIC	6	18 th European Conference on Information Systems (2; ^{40 41}); 36 th Hawaii International Conference on System Sciences (1; ⁴²); International Journal of Project Management (1; ¹¹); Journal of Management Information Systems (1; ⁴³); Project Management Journal (1; ⁴⁴)
PC	12	International Journal of Project Management (5; ^{45 10 46 47 48}); Project Management Journal (2; ^{49 50}); IEEE Transactions on Engineering Management (1; ⁵¹); International Journal of Managing Projects in Business (1; ⁵²); International Journal of Intercultural Relations (1; ⁵³); Journal of Information, Information Technology, and Organizations (1; ⁵⁴); Management Research Review (1; ⁵⁵)
PS	9	International Journal of Project Management (4; ^{56 57 58}); International Journal of Managing Projects in Business (2; ^{59 60}); Construction Management and Engineering (1; ⁶¹); ISRN Industrial Engineering (1; ⁶²); Book (1; ⁶³)
PSI	9	International Journal of Project Management (3; ^{64 3 65}); Project Management Journal (2; ^{66 67}); Knowledge and Process Management (2; ^{68 69}); Journal of Construction Engineering Management (1; ⁷⁰); 38 th Hawaii Conference on System Sciences (1; ⁷¹)
Total	66	

Table 2 reveals that the literature review identified only 6 papers with relevant contributions to the *intercultural project customer management* (PIC) and 9 studies that are clustered into the *intercultural project stakeholder management* (PSI) category. The following sections will deepen the analysis to these two categories.

Intercultural Project Customer Management

Issues in theory and practice concerning cross-cultural project customer engagement are empirically recognized by a number of authors. Damian and Zwoghi identify cultural differences in global requirement negotiations as important impact factors because they make requirement communication, conflict resolution and trust building more difficult. Their cases identify these problems for negotiations between US, European, and Indian actors.⁴²

Zwikael et al. focus on differences in project management style between Israel and Japan by surveying 337 project managers from Israel and 88 from Japan. Whilst this study is not explicitly investigating project customer management, their findings reveal that there may be culture specific differences in customer expectations. In Japan, for example, project management would rather focus rather on communications planning and managing time and cost constraints, whilst Israeli customers may forgive cost and schedule overruns if the project delivers superior technical performance.¹¹

The two studies that show the highest relevance for the research question of this paper are published in the proceedings of the 18th European Conference on Information Systems. Gregory offers a literature review surveying the role of cross-cultural differences and management practices in information systems offshoring projects. The study concludes that “the overwhelming part of exploratory studies has shown the importance of informal, cultural and trust-based mechanisms” (p. 8). Research in this area should therefore move away from traditional economic theories towards sociological theories in order to establish effective management practices.⁴⁰

Vogt et al. make a theoretical contribution to the information systems offshoring literature by developing a conceptual model describing the relationship between social entity and conflict. This paper brings a social psychology perspective into the management of cross-cultural offshoring relationships. Furthermore Vogt et al. recommend the early establishment of a joint project culture. Further empirical research should be dedicated, among other things, to the subtle differences in the relationship between clients and vendors.⁴¹

Jain et al. take the perspective of the client company and address issues of vendor silence by developing a process framework that can be used for mitigating that particular communication breakdown in cross-cultural IT projects. This qualitative case study aims at providing guidance to client's project managers in IT offshoring projects between India and the US. The most insightful contribution is the change in perspective towards a client based approach and the finding that cultural differences do cause problems like "vendor silence".⁴³

Yitmen offers the most recent contribution to cross-cultural project customer management. The article offers a cultural intelligence (CQ) perspective by surveying contracting companies. This is the only article in this cluster that focuses on contractor-client relationships in the construction industry. Whether or not the findings of this article are transferable to other industries remains to be seen. The recommendation of using an Organizational CQ Statement for enhancing managerial cultural competence also seems applicable in other industries. A causality path that links CQ, cross-cultural competence and international strategic alliances is proposed. Considering the limitations of the paper, however, additional research has to prove the validity of these results in other industry sectors, national settings, or organizations.⁴⁴

The above contributions offer insight into potential factors that impact the management of project customers from diverse cultures. It is shown, however, that the current state of scientific knowledge does not conclusively reveal success factors for cross-cultural project customer integration, nor does it offer tangible models or recommendations for project managers facing intercultural challenges when engaging with their customers. Particularly Vogt⁴¹ shows that questions surrounding that particular relationship remain to be subject of further investigation.

In order to include contributions from the stakeholder management domain, the next section will summarize the results that are categorized in the PSI intersection.

Intercultural Project Stakeholder Management

The studies with implications for cross-cultural stakeholder management are considered in order to complement the results from the Intercultural Project Customer Management area. Cultural differences between project stakeholders are identified by DeLone et al. as one among three main barriers to global IT project success. Cultural problems, time differences, and geographic distance are most frequently mitigated though better communication, task programming and rigorous project controls.⁷¹ However, these classical IT project management approaches do not work in all cultural backgrounds.

This is supported by two articles that are concerned with intercultural stakeholder management in development projects in Africa. Muriithi & Crawford investigate whether western project management approaches are applicable in the African context. Their findings suggest African culture and work values may run counter to western approaches and that an intercultural adaptation is necessary for managing project in Africa.⁶⁴ Ika (2012) identifies 4 project management traps in African development projects of which at least two are culture related: the accountability-for-results trap and the culture trap. Ika then proposes an agenda for tailoring project management to the African culture and for further research.⁶⁷

Knowledge sharing becomes a barrier to project success where stakeholders show large differences in technical knowledge, e.g. international IT, construction or manufacturing projects. This is shown by, both, Weir and Hutchings⁶⁸ and Kohlbacher and Krähe⁶⁹. Weir and Hutchings apply Nonaka's SECI model of knowledge sharing to Arab and Chinese cultures. They conclude that the model should be applied with caution in cultural backgrounds other than the original Japanese culture.⁶⁸ Kohlbacher and Krähe analyzed a case study of transferring production knowledge from Japan to Taiwan. They study propose a three step process that is tailored to the particularities of the case. They also sustain that "[C]ultural differences and methods to mediate and manage their consequences have played a crucial part in the knowledge transfer project implementation" (p.179).⁶⁹

Two further case studies of intercultural project stakeholders complement the picture described above. Mahalingam and Levitt argue that an institutional theory framework can help to understand conflict among culturally diverse stakeholders. They conclude that conflict arises from differences in regulatory, normative and cognitive/value-based

institutions.⁷⁰ De Bony's case study on a cooperative Dutch-French project supports the suggestion that the cultural background of project stakeholders may significantly impact on processes and procedures in international project management frameworks.³

Two more recent studies are identified that focus on cross-cultural challenges in the management of geographically dispersed project teams and stakeholders. After a literature review and a survey, Anantamula and Thomas conclude that the importance and impact of success factors are industry specific. Furthermore they highlight that cross-cultural project management differs from traditional approaches in that the managers need to adopt their management practices to the prevailing culture in order to integrate the key stakeholders.⁶⁶ Daim et al. conducted interviews with project team members in the high tech industry with the aim to investigate reasons for communication break-down among stakeholders. Factors impacting communication are cultural differences, interpersonal relations, leadership, technology and trust. The study concludes by stating that a strong presence of company culture may mitigate communication issues.⁶⁵ This factor, however, is lacking in the case of external stakeholders like project customers.

4. Conclusions

In the area of international and intercultural project management there is a large number of high quality contributions in the way of books and scientific articles. In particular Koester⁶ and Binder⁷ offer comprehensive insight into how national culture affects project management and how project managers can include this variable into their work. Most of this is generalist work and is informed by scholars like Hofstede, Hall, or Trompenaars and Hampden-Turner. Publications in scientific journals mostly focus on specific countries, industries, or a very limited number of cases.

This review has shown that project stakeholder management in general and project customer management in particular receives attention mainly without considering potential differences in national cultures and the problems that result from these differences.

After analyzing 15 studies that contributed to either *intercultural project stakeholder management* (PSI), or *intercultural project customer management* (PIC), the following conclusions can be drawn regarding possible factors impacting project success. As shown in Table 3 there are 4 kinds of issues that featured as recurring impact factors in the discussed articles.

Table 3: Summary Preliminary Impact Factors for Cross-Cultural Project Customer Integration.

Impact Factors	Number of studies	Authors: NAME (YEAR)
Issues due to a lack of cross-cultural knowledge sharing	4	Weir and Hutchings (2005) ⁶⁸ ; Kohlbacher and Krähe (2007) ⁶⁹ ; Jain et al. (2011) ⁴³ ; de Bony (2010) ³
Issues due to a lack of cross-cultural intelligence	4	Daim et al. (2012) ⁶⁵ ; Jain et al. (2011) ⁴³ ; Yitmen (2013) ⁴⁴ ; Ika (2012) ⁶⁷
Issues due to a lack of trust among stakeholders	3	Daim et al. (2012) ⁶⁵ ; Jain et al. (2011) ⁴³ ; Gregory (2010) ⁴⁰
Issues due to cultural incompatibility of western PM approach	3	Muriithi and Crawford (2002) ⁶⁴ ; Ika (2012) ⁶⁷ ; (de Bony 2010) ³

From this preliminary literature review it has become evident that problems with cross-cultural project customer integration are of high practical relevance, but have not been conclusively addressed by scientific publications. Most importantly, the question for success factors in this regard has not been addressed. Table 3 aims at providing a distillate from the analysis of a very few relevant articles. The four preliminary impact factors are based on only 8 articles and are not free from interdependencies. Causal relationships may exist, e.g. between trust and knowledge sharing or between project management methods and cultural intelligence.

The aim of further research activity will be to find complementing cases and to develop a research framework for the identification of good practices and additional success factors in cross-cultural project customer integration. Additional case study evidence is required and may be delivered through complementary literature research or

empirical studies. Additional empirical research will be helpful in order to identify and validate success factors for cross-cultural customer engagement in projects.

5. Outlook and Critical Assessment

The above report is a summary of an ongoing investigation into what is known in the area of cross-cultural customer integration in projects. It has become clear that additional research needs to be undertaken in order to complement the current picture. The identified studies do not sufficiently address cross-cultural client integration. Further literature research needs to be undertaken and will be complemented by empirical research aiming at the identification and evaluation of success factors.

The major limitation of this research is the small number of identified articles. Additional literature review should include neighboring disciplines such as intercultural marketing, communication and management/leadership areas and the international IT offshoring body of knowledge. There are a number of questions that emerged during the execution of this literature review that need to be addressed to complement of this study:

- Are there additional impact factors in the relationship between vendors and clients in intercultural projects?
- What are the cause and effect relationships between these impact factors?
- What are the strategies, or best practices, that project managers employ to mitigate the negative impact of cultural differences in client-vendor relationships?
- Is there any potential to leverage cultural differences for better project performance through intercultural synergies?
- Are agile project management techniques part of the cure? And what adjustments are needed in order to establish cultural compatibility?

These questions indicate potential future research opportunities in the area of cross-cultural project customer integration. Future research will have to be industry specific (cf. Anantatmula and Thomas, 2010), contributing knowledge, e.g. for the IT or construction industry.⁶⁶ Identifying success factors and best practices in this area will help project managers to adapt their project management to the cultural environment.

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